



**E85**

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**Caley Johnson**

National Renewable Energy Lab  
Caley.johnson@nrel.gov

- **National Program**
  - Ethanol Handbook
  - AFDC Station Locator
  - Equipment testing/listing and codes/standards
- **Coalitions**
  - Chicago requires use of E85 in FFVs owned by the city
  - Several coalitions teamed up to create the I-65 Ethanol refueling corridor
  - Many E85 outreach events and literature distributions



Source: [www.in.gov](http://www.in.gov)

- **Vehicles:** 16.4M – predominantly light duty across many models
- **Stations:** Nearly 3,000 stations across 47 states/DC
- Serving mainly general public consumer
- Driven largely by broad policies
  - CAFE incentives for OEMs
  - EPA fleet requirements
  - Renewable Fuel Standard (RFS)
- E10 blend wall and RFS could increase supply of E85



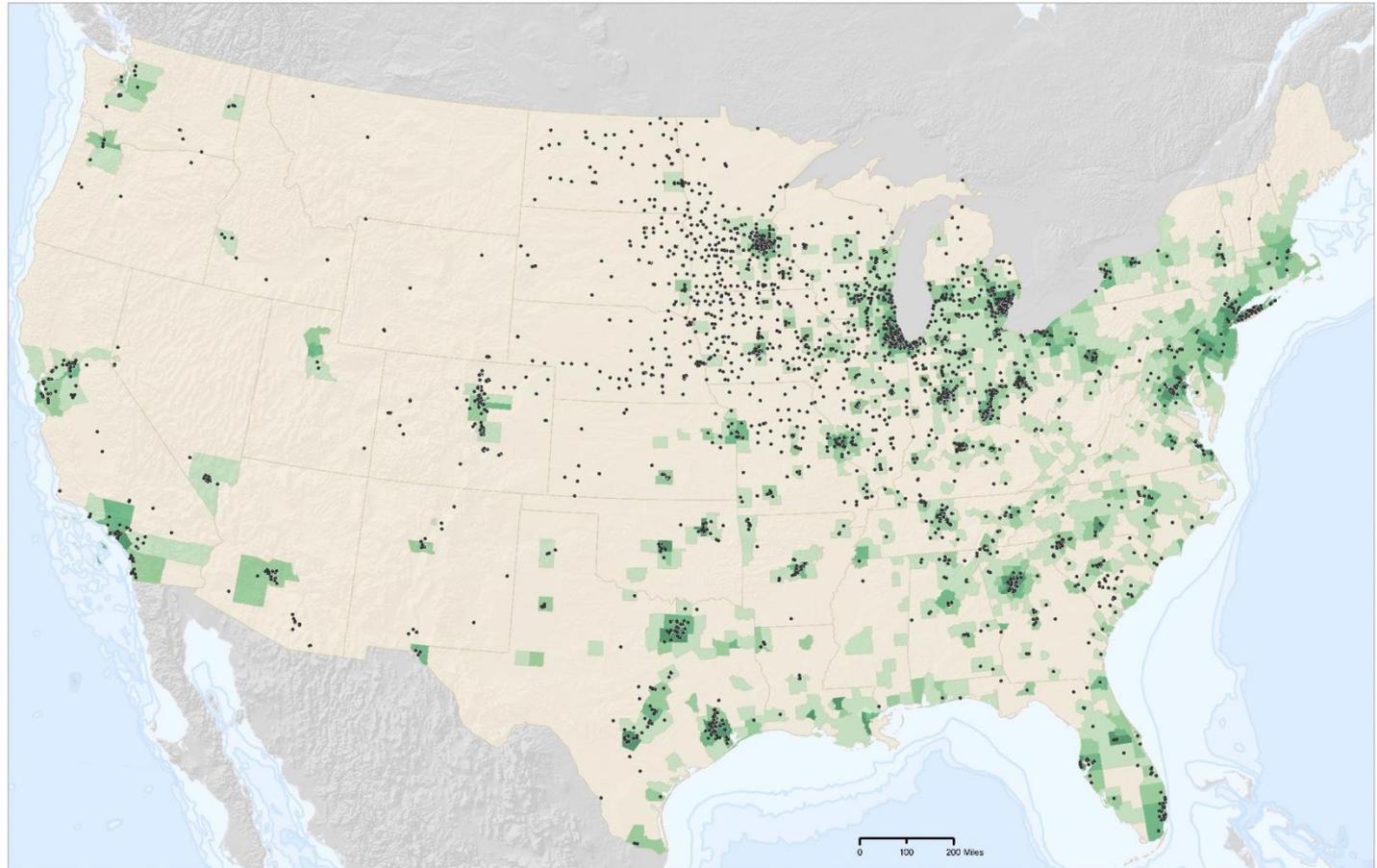
# Location of FFVs and E85 Fueling Stations



## U.S. Concentrations of Flex-Fuel Vehicles

Vehicles per 5 square miles

- 5 to 15
- 15 to 30
- 30 to 60
- > 60
- E85 Stations

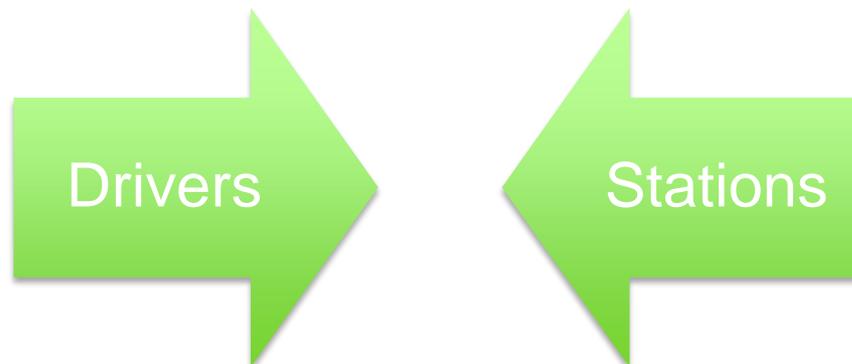


Data Source: Polk 2013,  
Alternative Fuels Data Center, 2015  
This map was produced by the  
National Renewable Energy Laboratory  
for the Department of Energy.  
January 2015



- Over 150,000 stations offering motor fuel across the US
  - Roughly 3,000 offer E85 (2%)
- The average fuel station dispenses 17,500 gallons of fuel per month per fueling position
  - Average E85 fueling position dispenses 435 gallons per month

With 16M vehicles on the road and nearly 3,000 stations—the potential exists for significant E85 sales.





Drivers

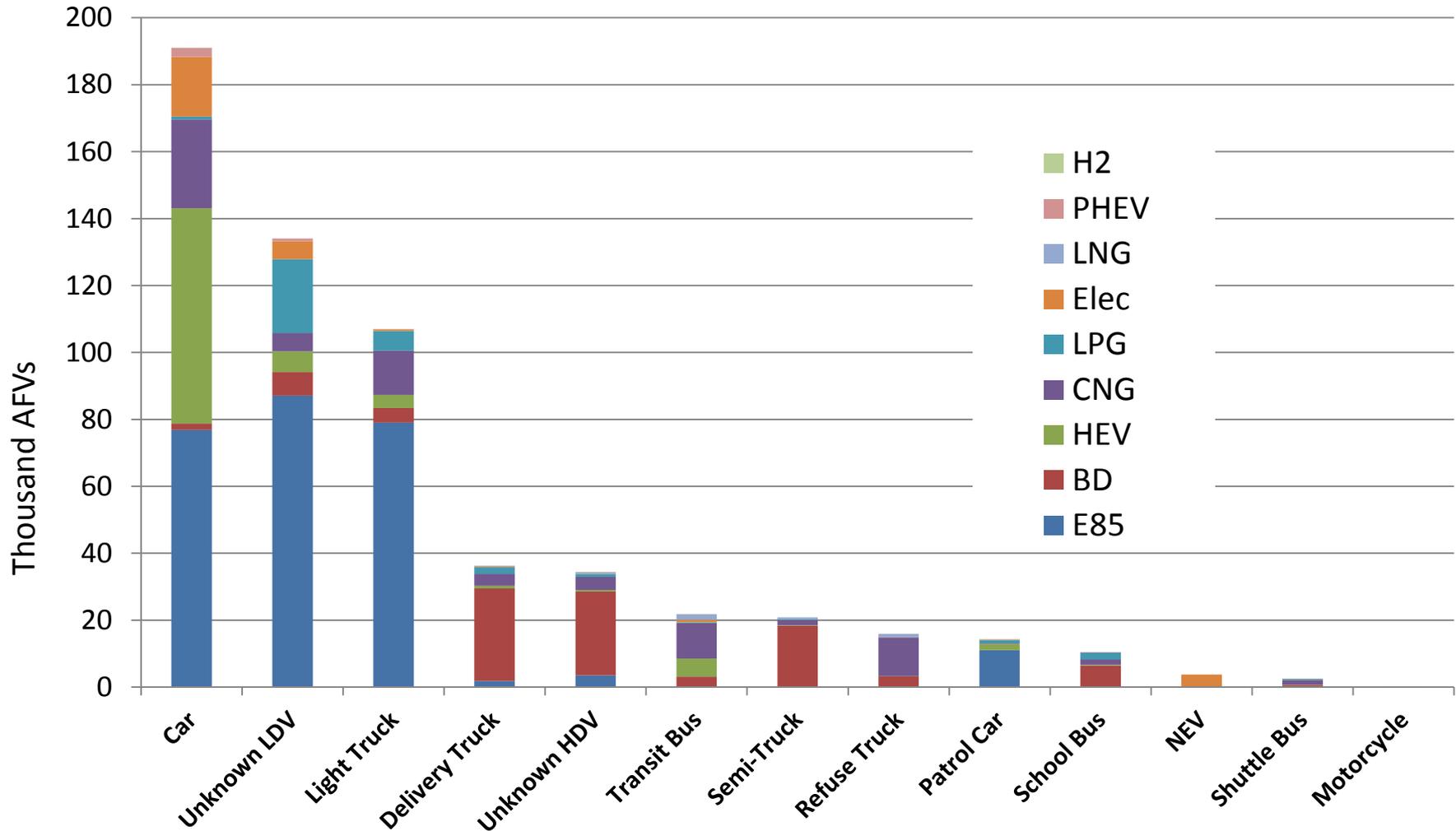
Stations



- Educate drivers on FFV technology in their garage
- Educate drivers on E85 availability in their neighborhood
- Inform the debate about ethanol's sustainability
- More Stations so more drivers have easy access
  - “Inconvenience cost” of an alternative fuel is very low once offered at 20% of all gasoline stations

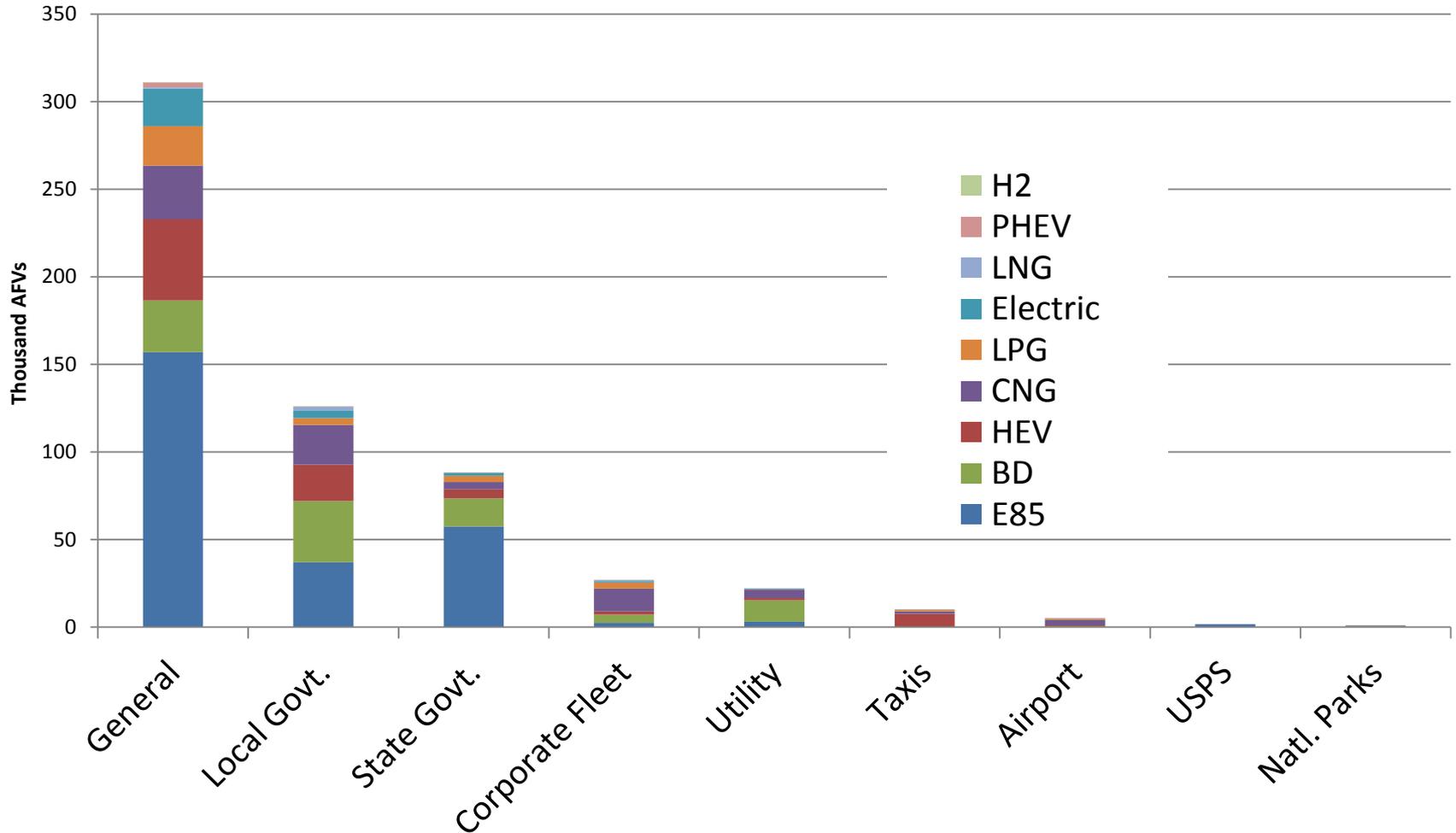
- National Clean Cities Program
  - Facilitate FFV owners to refuel with E85
  - Document E85 success stories
  - Training designed for retail fuel marketers
    - Direct source opportunities could allow pricing flexibility
    - Equipment and facility needs
  
- Key Partnerships
  - Retail fuel marketers
  - Consumer groups
  - Regulated fleets
  
- Local Coalitions
  - Local initiatives to increase driver awareness
  - Work with innovative fleets on refueling behavior

# What Vehicles are Using FFVs?



Source: 2013 Clean Cities Annual Metrics Report

# Which Niches are Using FFVs?



Source: 2013 Clean Cities Annual Metrics Report

- Enough FFVs are on the road to potentially use a large quantity of E85
- Many E85 stations are underutilized
- Getting existing FFVs to use existing E85 stations is key
  - Clean Cities is doing this at the national level through numerous tools, station locator, success stories, and fuel and equipment certification
  - Clean Cities coalitions are doing this through outreach events, innovative fleet E85 locks, and corridors
- The most common FFVs are LDVs in the general population, state governments, and local governments

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Caley Johnson  
Transportation Market Analyst  
National Renewable Energy Laboratory  
[caley.johnson@nrel.gov](mailto:caley.johnson@nrel.gov)  
303-275-3607